

Attorney – Client Communication  
Privileged, Confidential, and Exempt from  
Disclosure under applicable law.  
Contains material prepared by counsel and  
may include advice of counsel.

**QUARTERLY REPORT**  
(also referred to as 90 Day Report)

DATE OF THIS REPORT:

**TRIAL DATE:**

BENCH: JURY:

CAPTION OF CASE:

CLIENT:

JDC# AND PARISH:

Suit#

JUDGE:

ORM#

ADJUSTER:

BILLING ATTORNEY:

Telephone Number:

CONTRACT ATTORNEY:

(If different from billing attorney)

I. SIGNIFICANT STEPS IN LITIGATION TAKEN SINCE LAST REPORT

A. DEPOSITIONS

(list by name, whether fact or expert, short summary of significant testimony)

B. DISCOVERY:

1. Filed on Client's Behalf

2. Preparation of Responses to Plaintiff and Co-Defendant's Discovery Request

3. Analysis of Responses received to Client's Discovery Requests:

4. Liens

a. Medicare \$

b. Other \$

5. Other

C. DISPOSITIVE MOTIONS:

(List all dispositive motions filed by any party and indicate basis for motion and, as applicable, basis for client's opposition to same)

D. SIGNIFICANT DISCOVERY MOTIONS FILED OR DEFENDED:

E. HEARING ON MOTIONS:

(Indicate Date and/or Outcome)

F. STATUS CONFERENCE:

(Date and Issues discussed)

G. PRETRIAL CONFERENCE:

(Date and Issues discussed)

- H. APPEAL/WRIT:  
(Critical dates and description of pertinent issues)
- I. ORAL ARGUMENT:  
(Indicate Date and/or Outcome)
- J. OTHER:
  
- II. AMENDMENT/SUPPLEMENT TO PLEADINGS (ALL PARTIES):
  
- III. AMENDMENT/SUPPLEMENT/UPDATE TO PLAN OF ACTION, IF ANY:
  
- IV. DESCRIBE ANY CHANGE IN EVALUATION OF LIABILITY SINCE LAST REPORT AND REASONS THEREFORE:
  
- V. DESCRIBE ANY CHANGE IN EVALUATION OF DAMAGES SINCE LAST REPORTAND REASONS THEREFORE:
  
- VI. DESCRIBE ANY SIGNIFICANT EVENTS IN LITIGATION THAT ARE NOT INCLUDED IN PREVIOUS RESPONSES.
  
- VII. DATE AND AMOUNT OF LAST SETTLEMENT OFFER & RESPONSE THERETO: (include any updated recommendations regarding settlement)
  
- VIII. IF THE ESTIMATES FOR ATTORNEYS FEES AND EXPENSES PREVIOUSLY SUBITTED ARE NO LONGER ACCURATE, PLEASE INDICATE CHANGES TO BUDGET AND REASONS FOR CHANGE:
  - A. UPDATED DEFENSE BUDGET:
    - 1. Maximum Judgment Value \$\_\_\_\_\_
    - 2. Expenses
      - a. Legal Fees \$\_\_\_\_\_
      - b. Support Personnel Costs \$\_\_\_\_\_  
(Paralegals, IME, experts, etc.)
    - 3. Other costs \$\_\_\_\_\_  
(Travel, deposition, outside copying photos/demonstrative evidence, etc.)
    - TOTAL EXPENSES \$\_\_\_\_\_

**REASONS FOR CHANGE IN BUDGET:**

SINCE THE DATE OF ASSIGNMENT, DESCRIBE ANY REAL OR POTENTIAL CONFLICT OF INTEREST THAT HAS ARISEN THAT WOULD PROHIBIT YOU OR YOUR FIRM FROM CONTINUED REPRESENTATION IN THIS CASE:

DATE NEXT REPORT IS DUE:

\_\_\_\_\_  
Signature

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## **INSTRUCTIONS FOR SUBMISSION OF QUARTERLY REPORT:**

This form is to be completed and submitted 90 days after the due date for the Six Month Case Assessment, and every 90 days thereafter, unless the status of the case is such that counsel can take no action to move the case along. For example, if the case is in “monitor only status” while the period of abandonment accrues, trial counsel should cease submitting this form after consultation and agreement with the ORM adjuster that the case is on a path for abandonment. When, or if, An event occurs such that a case is no longer in “monitor only” or inactive status, report the reason for the change on this form and resume submission of this form every 90 days thereafter.

E-mail or fax completed form to the adjuster at ORM and to the appropriate Section Chief at the Department of Justice and email a copy to the Director of Litigation at [LitDir@ag.state.la.us](mailto:LitDir@ag.state.la.us).